



Iowa Inheritance/Estate Tax

Joint Account Report Form

Complete all applicable lines on this form.

Date _____, _____

To be completed and mailed by banks, credit unions, savings and loan associations, or any other person or institution to the Iowa Department of Revenue upon report of the death of the owner of a joint account, as required by section 450.97 of the Code of Iowa.

(1) Name of Reported Decedent _____
(Use decedent's first name, last name, and middle initial)

(2) Address of Reported Decedent _____
_____, County _____

(3) Reported Date of Death _____

(4)

Name and Address of Surviving Owners	Relationship	ACCOUNT NUMBERS			Value Date of Death
		Savings Account	Checking Account	Certificate of Deposit	

(5) Name and Social Security Number of person(s) to which income is paid as reported on form 1099.

NAME	SOCIAL SECURITY NUMBER

(6) Date Released _____, _____

(7) To whom released _____

Address _____

Phone Number _____

(8) Name of institution reporting _____ City _____

(9) Name and title of institution representative making this report from its account record _____

Mail reports to:

EXAMINATION SECTION
Iowa Department of Revenue
PO Box 10456
Des Moines IA 50306-0456